

POSITION DUTY STATEMENT

PM-0924 (REV 11/2017)

CLASSIFICATION TITLE Associate Transportation Planner	OFFICE/BRANCH/SECTION District 1, Transportation Planning	
WORKING TITLE Local Assistance Planner	POSITION NUMBER 901-800-4721-021	EFFECTIVE DATE

As a valued member of the Caltrans team, you make it possible for the Department to provide a safe, sustainable, integrated, and efficient transportation system to enhance California's economy and livability. Caltrans is a performance-driven, transparent, and accountable organization that values its people, resources and partners, and meets new challenges through leadership, innovation and teamwork.

GENERAL STATEMENT:

This position is in the Local Assistance Unit, which is under the direction of the Local Assistance Chief, a Senior Transportation Engineer. This unit is responsible for project management and helping deliver State and Federal funded projects with local governmental agencies and regional transportation planning agencies. The incumbent will manage local agency transportation projects from conception to completion. The incumbent must understand techniques in financing, consultant selection, construction management, and Federal Highway Administration's code of regulations. Duties include, but are not limited to:

CORE COMPETENCIES:

As an Associate Transportation Planner, the incumbent is expected to develop the following competencies as described below in order to successfully perform the essential functions of the job, while adhering to and promoting the Department's Mission, Vision, Values, and Goals.

- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Safety and Health - Commitment, Innovation)
- **Communication:** Expresses oneself clearly in all forms of communication. Gives feedback and is receptive to feedback received. Knows that listening is essential. Keeps others in the Division and other functional units informed as appropriate. (Safety and Health - Integrity, Teamwork)
- **Conceptual Thinking:** Ability to find effective solutions to issues by taking the appropriate perspective (i.e., holistic, abstract, or theoretical). (Stewardship and Efficiency, System Performance - Teamwork, Innovation)
- **Initiative:** Ability to identify what needs to be done and doing it before being asked or required by the situation. Seeks out others involved in a situation to learn their perspectives. (Stewardship and Efficiency, Organizational Excellence - Integrity, Commitment)
- **Problem-solving and Decision-making :** Identifies problems and uses logical analysis to find information, understand causes, and evaluate and select or recommend best possible courses of action. (Safety and Health, Stewardship and Efficiency Organizational Excellence - Integrity, Commitment)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Sustainability, Livability and Economy Organizational Excellence - Integrity, Teamwork)

TYPICAL DUTIES:

Percentage Essential (E)/Marginal (M) ¹	Job Description
35% E	Program/Project Manager Liaison: Acts as a program/project manager liaison between local agencies and the District Office of Local Assistance to coordinate programmed projects. Analyzes, interprets and implements Federal and State rules and regulations mandated by the Federal Highway Administration (FHWA) and Caltrans Division of Local Assistance.
30% E	Project Facilitator: Facilitates multi-function project teams of functional staff, functional managers, local stakeholders and customers, and resource agencies as necessary, to ensure successful delivery of assigned projects. Use various project databases for managing, programing, and processing critical documents for local agency projects.
30% E	Project Fiscal Planning: Assures local agency projects are accurately programmed and represented in the State Transportation Improvement Program (STIP), Federal Statewide Transportation Improvement Program (FSTIP) and other programming documents. This responsibility includes, but is not limited to: coordination with District 1 Regional Planning, HQ Transportation Programming, Regional Transportation Planning Agencies, California Transportation Commission Liaison, Local Agencies, Division of Local Assistance, and Resource Agencies.
5% M	Field Work Coordination: Work with Environmental Coordinators and Area Engineers with the planning and coordination of on-site reviews to evaluate phases or components of local agency projects.

¹ESSENTIAL FUNCTIONS are the core duties of the position that cannot be reassigned.

MARGINAL FUNCTIONS are the minor tasks of the position that can be assigned to others.

ADA Notice

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SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS

There are no direct supervisory responsibilities in this position, however the incumbent may act as lead worker to other staff.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Ability to maintain current knowledge of pertinent State and Federal policies, procedures, and regulations regarding public transit.

Requires knowledge of local planning processes and project management techniques, and skills working with stakeholders.

Must communicate clearly and effectively to individuals and groups, both orally and in writing. Ability to plan, organize and prioritize a complex workload; prepare and present technical information in a format suitable for management and local partner reporting; establish and maintain cooperative working relationships. Ability to investigate, identify and resolve/propose solutions to problems in an iterative process; and analyze and develop meaningful recommendations for management.

Knowledge of the use of computer software programs, including Microsoft Word, Excel, PowerPoint, Outlook, OneNote, Teams, filemaker and Geographic Information Systems (GIS) is desirable.

Must be able to establish and maintain positive co-operative working relationships in an office environment with co-workers and employees of local agencies. Must be results oriented. Must be able to travel to various locations, occasionally requiring an overnight stay for meetings, field reviews or training purposes.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Independently performs responsible and complex administrative work for the Local Assistance Program. Incorrect information supplied to management, Division of Local Assistance, local agencies or Federal Highway Administration could result in monetary loss and impaired local project delivery.

PUBLIC AND INTERNAL CONTACTS

Communicates within the Division, other district divisions, and headquarters. Have frequent contact with state, county, city and other local agencies on transportation project environmental matters. Contact is by telephone, e-mail, facsimile and in person.

Represents the District Local Assistance Engineer at various meetings involving local governments and allied agencies.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Incumbent will be required to sit for long periods using a keyboard and video display terminal, or while attending meetings.

Frequent travel by car, for distances up to 350 miles one way, sometimes overnight will be required. Travel to different floors of the District Office to communicate with departmental or other divisional staff or attend meetings will also be required. May be required to transport heavy boxes to various locations throughout the District. Incumbent must have good organizational skills and be able to focus and multitask in order to answer agency inquiries, review documents, maintain project schedules and meet strict deadlines. Will be required to respond tactfully and courteously and resolve emotionally charged issues reasonably and diplomatically.

WORK ENVIRONMENT

While at their base of operations, incumbent will work in an office under artificial lighting. Incumbent may also be required to drive to field sites and meetings, work outdoors, and may be exposed to dirt, noise, uneven surfaces and/or extreme temperatures.

This position may be eligible for partial telework. The amount of telework is at the discretion of the Department and based on Caltrans's evolving telework policy. Caltrans supports telework, recognizing that in-person attendance may be required based on operational needs. Employees are expected to be able to report to their worksites with minimum notification if an urgent need arises. The selected candidate will be required to commute to the headquartered location as needed to meet operational needs.

Business travel may be required, and reimbursement considers an employee's designated headquartered location, primary residence, and may be subject to CalHR regulations or applicable bargaining unit contract provisions. All commute expenses to the headquartered location will be the responsibility of the selected candidate.

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I have read, understand and can perform the duties listed above. (If you believe you may require reasonable accommodation, please discuss this with your hiring supervisor. If you are unsure whether you require reasonable accommodation, inform the hiring supervisor who will discuss your concerns with the Reasonable Accommodation Coordinator.)

EMPLOYEE (Print)

EMPLOYEE (Signature)	DATE
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I have discussed the duties with, and provided a copy of this duty statement to the employee named above.

SUPERVISOR (Print)

SUPERVISOR (Signature)	DATE
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CLASSIFICATION TITLE Transportation Planner	OFFICE/BRANCH/SECTION D1 Planning and Local Assistance	
WORKING TITLE Local Assistance Planner	POSITION NUMBER 901-800-4768-020	EFFECTIVE DATE 01/01/2021

As a valued member of the Caltrans team, you make it possible for the Department to provide a safe, sustainable, integrated, and efficient transportation system to enhance California's economy and livability. Caltrans is a performance-driven, transparent, and accountable organization that values its people, resources and partners, and meets new challenges through leadership, innovation and teamwork.

GENERAL STATEMENT:

This position is in the Local Assistance Unit, which is under the direction of the Chief, Local Assistance, a Senior Transportation Engineer. This unit is responsible for oversight of local governmental agencies' transportation projects that are funded through Caltrans. The incumbent is involved in a multidisciplinary team that provides project oversight from conception to completion. The incumbent must understand techniques in highway financing, design, consultant selection, construction management, and Federal Highway Administration's code of regulations.

CORE COMPETENCIES:

As a Transportation Planner, the incumbent is expected to become proficient in the following competencies as described below in order to successfully perform the essential functions of the job, while adhering to and promoting the Department's Mission, Vision, Values, and Goals. Effective development of the identified Core Competencies fosters the advancement of the following Leadership Competencies: Change Commitment, Risk Appetite, Self-Development/Growth, Conflict Management, Relationship Building, Organizational Awareness, Communication, Strategic Perspective, and Results Driven.

- **Learning on the Fly:** Learns quickly, is open to change, experiments, and is flexible. (Stewardship and Efficiency - Commitment, Innovation)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Organizational Excellence - Integrity)
- **Reliability:** Ability to demonstrate dependability in meeting commitments, and providing a consistent work product. Takes responsibility for individual actions in order to meet deadline demands. (Stewardship and Efficiency - Commitment)
- **Conflict Management:** Recognizes differences in opinions and encourages open discussion. Uses appropriate interpersonal styles. Finds agreement on issues as appropriate. Deals effectively with others in conflict situation. (Organizational Excellence - Teamwork)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Stewardship and Efficiency/Organizational Excellence - Commitment, Teamwork)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Organizational Excellence - Teamwork)
- **Communication:** Expresses oneself clearly in all forms of communication. Gives feedback and is receptive to feedback received. Knows that listening is essential. Keeps others in the Division and other functional units informed as appropriate. (Organizational Excellence - Teamwork)
- **Planning and Results Oriented:** Organizes and executes work to meet organizational goals and objectives while meeting quality standards, following organizational processes, and demonstrating continuous commitment. (Stewardship and Efficiency - Commitment)
- **Thoroughness:** Ensures that work and information is complete and accurate. Ensures that assignment goals, objectives, and completion dates are met. Documents and reports on work progress. (Organizational Excellence - Integrity)

TYPICAL DUTIES:

Percentage	Job Description
Essential (E)/Marginal (M) ¹	

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40%	E	Program/Project Manager Liaison. Will act under instruction and guidance of the Senior Transportation Engineer as a program/project manager liaison between local agencies and the District Office of Local Assistance to coordinate programmed projects. Will assist in analyzing, interpreting and implementing Federal and State rules and regulations mandated by the Federal Highway Administration (FHWA) and Caltrans Division of Local Assistance. Will assist in the management of the following transportation programs: Highway Performance Monitoring System, County Maintained Mileage, Functional Classification, and California Road System maps, Cooperative Work Agreements (CWA), Annual Obligation Plans, Quality Assurance Plans (QAP), Disadvantaged Business Enterprise (DBE). Other programs may be added.
40%	E	Project Facilitator: Assists in facilitation of multi-function project teams of functional staff, functional managers, local stakeholders and customers, and resource agencies as necessary, to ensure successful delivery of assigned projects. Under supervision, accesses project databases for managing local agency projects. This includes running reports to assist with monitoring all project milestones including, but not limited to, NEPA, Permits, PS&E, Right of Way Acquisition, Timely Use of Funds, Advertisement, Award, Construction, and project completion. Databases include: GLADIS, LP2000, California Transportation Improvement Program System (CTIPS), and Federal Aid Database System (FADS).
10%	E	Project Programming Coordination: Helps to assure local agency projects are accurately programmed and represented in the State Transportation Improvement Program (STIP), Federal Statewide Transportation Improvement Program (FSTIP) and other programming documents. This responsibility includes, but is not limited to: coordination with District 1 Regional Planning, HQ Transportation Programming, Regional Transportation Planning Agencies, California Transportation Commission Liaison, Local Agencies, Division of Local Assistance, and Resource Agencies.
5%	M	Field Work Coordination: Work with a multidisciplinary team in the planning and coordination of on-site reviews to evaluate local agency projects. Gives support in the coordination of environmental impacts with the Local Assistance environmental specialists, within their field of expertise, to arrive at impacts/solutions consensus.
5%	M	Process Reviews: Will occasionally participate in meetings, as part of the District Local Assistance team, with local agencies and/or State and Federal Process Review teams to review project files and procedures. This includes, but is not limited to, assisting in the review of the local agencies' contract procedures with consultants for various phases of project components, construction bidding documents to ensure all procedures, as outlined in the Local Assistance Procedures Manual, are followed correctly, and Environmental Compliance as a result of NEPA Delegation. As a result of the Process Reviews will assist with the Division of Local Assistance to ensure corrective actions are taken, if needed, and completing Final Process Review documents.

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SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS

The incumbent does not supervise other employees but may have lead worker responsibility over multidisciplinary groups during special project assignments.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Knowledge of: The basic planning process and general practices of transportation planning; research methods and techniques including conducting or participating in the planning studies, and contemporary transportation, environmental, land use, social, economic, fiscal, legal, and political issues; effective public participation techniques; the Department's mission, organization, policies, and procedures; Federal and State laws and regulations; concepts and terminology relating to transportation planning; sources of funding transportation programs; desktop and mainframe computer applications that can create management reports.

Ability to: Gather, compile, analyze, and interpret data; learn planning processes; reason basically and creatively; develop formats to present and display data; use a variety of analytical techniques to propose solutions to or provide information regarding transportation problems; develop and evaluate alternatives; present ideas effectively orally and in writing; work effectively with others as an interdisciplinary team member; establish and maintain effective and cooperative working relationships with those contacted during the course of work; assist in studies related to State transportation planning; help analyze problems and develop appropriate solutions; assist in recommendation of effective course of action; evaluate general planning proposals; plan, organize and schedule work to accomplish the District Office of Local Assistance Program mission, goals and objectives; ability to use own initiative to take the appropriate action as dictated by schedule or receipt of information;

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read and interpret documents such as Department Directives, policies, procedure manuals and statutes; learn and understand project management and project development practices in order to monitor the progress of Local Assistance programs and projects for reporting purposes; able to establish and maintain positive cooperative working relationships in an office environment with co-workers and employees of local agencies; able to travel to various locations, occasionally requiring an overnight stay for meetings, field reviews or training purposes. Good verbal and writing communication skills are necessary.

Knowledge in the use of computer software programs, including Microsoft Word, Excel, PowerPoint, OneNote, Team and FileMaker Pro is helpful.

Must be able to establish and maintain positive co-operative working relationships in an office environment with co-workers and employees of local agencies. Must be able to travel to various locations, occasionally requiring an overnight stay for meetings, field reviews or training purposes.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Errors in monitoring funding and schedules could jeopardize Federal and State funding to local agencies. The consequences of incomplete, inaccurate or untimely documentation for local agency projects can cause delays of advertisement, award and construction dates. Errors could result in adversely affecting local and regional agencies and the public's opinion of the Department.

PUBLIC AND INTERNAL CONTACTS

Communicates within the Division, with other District staff, and with Headquarters staff. Have frequent contact with State, county, city, Tribes and other local agencies on transportation project matters. Contact is by telephone, e-mail, and in person. Represents the District Local Assistance Engineer at various meetings involving local governments and allied agencies.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

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EMPLOYEE (Print)

EMPLOYEE (Signature)	DATE
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SUPERVISOR (Print)

SUPERVISOR (Signature)	DATE
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